

# PSOM Promotion Guidelines

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# Agenda

- ▶ Promotion framework
- ▶ Flexibility in Timelines
- ▶ CE Revisions
- ▶ AC track promotion revisions

# Key Messages

- ▶ Trajectory and impact more important than time
- ▶ Promotion timelines are more flexible
- ▶ Holistic review of faculty candidates
- ▶ Mitigating circumstances do matter

# Promotion Guidelines Highlights

- ▶ Fundamental to promotion in all tracks:
  - evidence of continuously evolving academic productivity and a clear upward trajectory captured through an evaluation of the totality of the impact of a candidates' body of work.
- ▶ Tenure, Clinician Educator and Research track faculty must demonstrate continuous scholarly productivity but can explicitly include other significant achievements in their case for promotion.

# Promotion Guidelines: Key Terms

- ▶ Impact - direct effect of one's work on science, medicine, health care, patient care and/or our community; assessed by a variety of metrics.
- ▶ Trajectory - momentum in pursuit of one's career path.
  - Promotion anticipates continued upward trajectory and impact.
  - Trajectory will be interpreted within the context of mitigating life circumstances.

# Promotion Guidelines: Key Terms

- ▶ Collaborative research- distinctive contributions to a team of investigators that results in publication and is recognizable by extramural consultants and others.
  - Individual investigators should be able to identify the unique, original, and expert skills and ideas contributed to a project.
- ▶ Community engagement- institutional, local, national, and international community contributions that reflect innovations in science/medicine/healthcare that improve health.

# Promotion Guidelines: Key Terms

- ▶ Institutional citizenship- participation in mentoring, professionalism, and health equity related service relevant to faculty member's academic activities and missions of PSOM/University.
- ▶ Professionalism- exemplary behavior including the demonstration of honesty and integrity in all realms of work, respect for patients, colleagues, staff and learners at all levels, evidence of continuous learning and self-management toward a goal of personal betterment, and the encouragement of questions, debate and acceptance of diverse viewpoints without prejudice or bias.

# Assessment of Impact and Trajectory

- ▶ Continuous scholarly productivity required for TT, CE and RT.
- ▶ Faculty may engage in any area of research but must demonstrate growth in impact/trajectory over time.
- ▶ Contributions to inclusion, diversity and equity as well as community engagement shall be carefully considered particularly if aligned with, and complementary to a candidates' academic work.



# Assessment of Impact/Trajectory: Scholarship

- ▶ Requires evidence of successful translation of new knowledge into new approaches, techniques, devices, programs etc:
  - Peer reviewed research papers (citations, contribution to work, authorship)
  - Grant funding
  - Academic awards
  - Participation in study sections, organizing committees, etc.
  - Editorial leadership roles
  - External lectures and invited talks
  - Health equity activities aligned with primary research
  - Patents and commercialization aligned with primary research program
  - Identifiable contributions to team science
  - Other

# Assessment of Impact/Trajectory: Clinical

- ▶ Contributions to innovative approaches to diagnosis, treatment or prevention of disease; applications of technologies and/or models of care delivery that improve clinical care
- ▶ Service on committees in area of clinical expertise
- ▶ Leadership roles related to clinical expertise
- ▶ Demonstrated commitment to health equity in clinical practice
- ▶ Invitations to share expertise ie talks, book chapters, clinical reviews
- ▶ Awards for contributions and/or innovation in the area of clinical expertise
- ▶ Regional, national and international patient referrals
- ▶ Engagement/collaboration in clinical trials
- ▶ Clinical awards
- ▶ Other

# Assessment of Impact/Trajectory: Education

- Education Impact Committee
  - Aligned current research definition of impact to education.
  - Identified and modified existing national frameworks of teaching impact.
  - Identified possible metrics for all categories.
  - Defined excellence in each based on possible metrics.
  - Eliminated minimum score standards for promotion.



# Education Impact Categories

- Teaching
- Learner Assessment
- Curriculum/course development
- Mentoring and advising
- Education leadership and administration
- Education scholarship

Definition document has been reorganized but none of the rules have changed



# Where does teaching data fit in?

- Data for the teaching category (TED, Blue etc) remains required but no min score for consideration of promotion.
- Low scores must be contextualized and any teaching related performance improvement plans discussed in EO summary.
- Faculty with scores  $\leq 3$  shall receive outreach from the dept with the goal of improving teaching.

# Categories Required for Promotion

- Internal teaching data will be reviewed if available.
- Promotion can be considered for those with only internal teaching data if exemplary.
- If no data is available in the teaching category, then a candidate will typically need to demonstrate trajectory and impact in at least 2 other categories.

# Education Portfolios

- Capture the impact and trajectory of a faculty members' educational activities for consideration of promotion.
  - Expands the evaluation of teaching beyond trainee evaluations.
  - Faculty have significant discretion in presentation of their impact.
- Promotion to Associate requires high quality engagement and demonstrated impact in education.
- Promotion to Professor also requires growth over time
  - Need demonstration of educational impact on trainees, programs, courses etc locally, nationally and internationally.

# Holistic Review

- There is no set formula for promotion.
- Each candidate will have generated a highly unique set of contributions that will be independently evaluated.
- There must be clear evidence of impact and positive trajectory for consideration of promotion.
- Requires a well described career narrative and mitigating circumstances, if applicable.



# Personal Statement Revisions

- ▶ Opening paragraph characterizes your career path; what led to your focus.
- ▶ Describe 3-5 most significant accomplishments since your appointment or last promotion and how your efforts have advanced PSOM's academic mission.
  - If accomplishments are publications, cite and describe your specific roles in work.
  - If part of team science, describe unique and critical contributions to the effort.
- ▶ If not already described, all faculty who teach need a paragraph on teaching.
- ▶ All clinicians may describe clinical expertise/activities.
- ▶ The final paragraph describes future directions/areas of planned expansion and growth in area of expertise.

# Statement of Mitigating Circumstances

- ▶ PSOM recognizes that significant events (pandemic, personal or family issues, etc.) may impact academic trajectory.
- ▶ 2 ways to express:
  - Incorporate such mitigating factors into personal statement so it is available for review by extramural consultants, COAP and Dean's office.
  - Provide a brief addendum to the personal statement for internal purposes only-not shared with EC's.

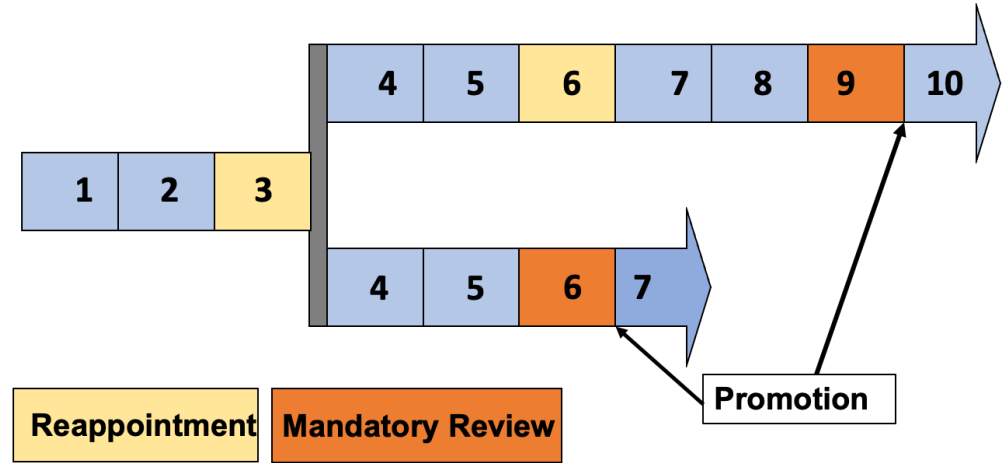


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# Faculty Tracks at Penn Health Schools

- Standing Faculty
  - Tenure
    - Basic
    - Clinical
  - Clinician Educator
- Associated Faculty
  - Research Track
  - Academic Clinician



# Promotion Flexibility

- ▶ Promotion is based on the peer review of one's impact in an AoC.
- ▶ Generally, promotion to associate does not occur before second reappt.
  - Faculty on steep trajectory may be ready sooner, but rarely will be eligible until after successful completion of the first reappointment.
    - Unless time served elsewhere, the earliest promotion to associate professor is in year 4.
    - If declined, candidate may be brought back after 3 years.
  - Promotion to Professor may be considered after 3 years.
    - If declined, candidate may be brought back after 3 years.

# Promotion Timeline Flexibility

- Associate Professor
  - Generally, promotion to associate does not occur before second reappt.
  - Faculty on steep trajectory may be ready sooner but will not be eligible until after successful completion of 1st reappointment, unless time served elsewhere
    - If time served elsewhere, then promotion can be concomitant with reappointment
- Professor
  - Timing determined by trajectory and impact of accomplishments
  - Minimum time at Associate level is 3 years
- All references to “early” are eliminated

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# CE Appointment Criteria

- ▶ Research training
  - Advanced research experience/training required
  - Prior research productivity
- ▶ A minimum of 30% of non-clinical academic effort for scholarly and educational activities for a minimum of 3 years is required.
  - In select cases, 20% non-clinical effort may be acceptable as 10% of clinical effort may be counted towards protected effort if aligned with research.
- ▶ Administrative time is not academic time.
- ▶ Non-salary resources to facilitate scholarship should be provided.
- ▶ Mentoring
- ▶ K awardees can't perform clinical work to make up for salary shortfalls.



# CE Research Support Beyond 1st Reappointment

- ▶ In general, unfunded research effort can be allocated to academically productive faculty and supported from nonoperational sources (gifts, endowments, designated funds).
- ▶ Faculty with clinical privileges
  - Funding for scholarly effort should be extramural/nonoperational sources.
  - Effort devoted to teaching, grant preparation, and administration can be covered by operational sources.
  - If adequate funding is not available, increase in clinical activity is expected.
  - Salary can be reduced per CPUP and PSOM policies.



# CE Research Support Beyond 1st Reappointment

## ► Faculty without clinical privileges

- Funding for scholarly effort should be from extramural/nonoperational sources.
- Effort devoted to teaching, grant preparation, and administration can be covered by operational sources.
- If adequate funding not available, faculty may enter a 1-year of observation with clear written expectations set by the department chair (and reviewed by the Dean's office) regarding the need to generate salary support.
- Salary can be reduced per CPUP and PSOM policies.
- Failure to meet expectations will lead to a terminal year appointment per the University handbook.

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# Summary of Major Changes For AC

- ▶ Promotion flexibility
- ▶ Credit for time served in prior faculty appointment
- ▶ Foundational requirements
- ▶ Elevation of importance of impact/reputation in AoC for promotion

# Credit for Time Served

- ▶ Time in rank at peer institution may be considered when assessing a candidate's trajectory and engagement.
  - Candidates with at least two years in a faculty appointment prior to PSOM, could be considered concomitantly with the first reappointment.
  - Such proposals will be rare and should be pre-reviewed by the PSOM COAP ACC chair prior to initiating a request for promotion in the department.

# Foundational Requirements

- ▶ Demonstrated excellence in education
- ▶ Demonstrated excellence as a clinician (or providing contributions to the clinical mission)
- ▶ Sustained professionalism

# Change in Evaluation Process

- ▶ Peer evaluations will focus on impact in AoC
- ▶ External peers necessary for professor
- ▶ Elimination of clinical performance evaluations
- ▶ Inclusion of non faculty referees